

**BUILDLINK ANALYTICS | FREE RESOURCE**

# Deal and Project Intake Scorecard

A practical scorecard for brokerages, agents, lenders, and general contractors to evaluate whether a real estate opportunity or construction project is actually ready for action.

**BUILT FOR**

Brokerages, agents, lenders, and general contractors.

**USE CASE**

Qualify opportunities before they absorb time, estimating effort, or internal coordination.

**SCORING**

Rate each item from **0** to **2**. Higher scores indicate stronger readiness.

**OVERVIEW**

# How to use this scorecard

Use this document at intake, before serious pursuit begins. It is designed to surface weak information, unrealistic assumptions, and missing decision structure early.

**SCORE 0****Missing or unknown**

The information does not exist, cannot be verified, or is too vague to rely on.

**SCORE 1****Partially defined**

Some information exists, but it is incomplete, inconsistent, or not yet decision-ready.

**SCORE 2****Clear and usable**

The information is available, credible, and strong enough to support next-step action.

## PROFILE

# Basic opportunity profile

|                                 |
|---------------------------------|
| <b>Opportunity name</b>         |
| <b>Client or stakeholder</b>    |
| <b>Property or project type</b> |
| <b>Location</b>                 |
| <b>Estimated size or scope</b>  |
| <b>Target timeline</b>          |

## SCORING BLOCKS

# Readiness categories

| CATEGORY                        | SCORE ITEMS  |
|---------------------------------|--|
| <b>Decision-maker readiness</b> | <ul style="list-style-type: none"> <li>Clear decision-maker identified</li> <li>Budget authority confirmed</li> <li>Timeline expectations stated</li> <li>Main objective clearly defined</li> <li>Next-step approval path understood</li> </ul>                    |
| <b>Documentation readiness</b>  | <ul style="list-style-type: none"> <li>Property or project documentation available</li> <li>Financial information available</li> <li>Existing reports or plans available</li> <li>Site or asset details confirmed</li> <li>Known constraints documented</li> </ul> |
| <b>Operational clarity</b>      | <ul style="list-style-type: none"> <li>Scope clearly described</li> <li>Primary risks known</li> <li>Dependencies identified</li> <li>External parties identified</li> <li>Communication path defined</li> </ul>   |
| <b>Execution readiness</b>      | <ul style="list-style-type: none"> <li>Timeline realistic</li> <li>Budget range plausible</li> <li>Required stakeholders engaged</li> <li>Handoffs understood</li> <li>Immediate next action defined</li> </ul>  |

**INTERPRETATION**

# Scoring bands

**0-10**

Not ready. Too many unknowns to move responsibly.

**11-20**

Early-stage. Can proceed only with clarification and tighter intake.

**21-30**

Viable but still needs stronger structure before full pursuit.

**31-40**

Ready for active execution, formal review, or partner engagement.

**INDUSTRY USE**

# How different teams can apply it

**BROKERAGES AND AGENTS****Qualify opportunities before time gets consumed**

Use it to test buyer, seller, investor, or portfolio opportunities before committing serious effort.

**LENDERS****Catch weak packages early**

Use it to identify incomplete borrower information, unsupported assumptions, or unrealistic timelines.

**GENERAL CONTRACTORS****Filter out weak preconstruction inputs**

Use it to flag unclear scope, missing site information, weak owner readiness, or unrealistic budgets.

**BUILDLINK NOTE**

**If the score is low, the information system is usually the real issue.**

When opportunities stall because reporting is fragmented, intake is inconsistent, or workflows are disconnected, the underlying problem is rarely just the deal itself. BuildLink Analytics helps teams tighten the operating structure before execution begins.

BuildLink Analytics | Analytics, automation, and intelligence integration for real estate and construction.